

The Road to FINANCIAL SUCCESS



Every journey starts with a single step. This year, take charge of your finances by setting SMART goals that pave your way to success. Use this worksheet to chart your course.

SMART Goal Breakdown

Specific: Define the destination—what do you want to achieve?

My goal is _____

Example: Budget to build an emergency fund. I will aim to save \$6,000 by the end of the year.

Measurable: Track your progress along the way.

I will track my progress by _____

Example: Using my SouthState mobile app to track my savings progress each month.

Achievable: Ensure your journey is realistic based on your current resources.

I will achieve this goal by _____

Example: Automating my finances. I will set up an automatic transfer to deduct \$250 each bi-weekly paycheck.

Relevant: Choose a goal that aligns with your bigger picture.

This goal helps me because _____

Example: Saving \$6,000 will put me in a better financial position in the future. If disaster were to strike, I would have a safety net to fall back on as opposed to racking up high-interest credit card debt.

Time-Bound: Set a timeline to reach the finish line.

I will complete this goal by (date) _____

Example: The end of the year, December 31.

The journey to financial success is made of small, intentional steps. SouthState is here to guide you every step of the way.

